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Memorandum

To: John Antolik, Louisiana State University System
Nick Bruno, University of Louisiana System
Tolor White, Southern University System
Jan Jackson, Louisiana Community and Technical College System
Nancy Rabalais, Louisiana University Marine Consortium

From: Donald J. Vandal, Deputy Commissioner for Finance and Administration

Date: June 26, 2009

Re: FY 2009-2010 Operating Budget, FY 2008-2009 Operational Fee Attestation and
FY 2009-2010 Mandatory Tuition and Fees Survey Requests

This memorandum shall serve as the official request from your respective institutions for the completion of the FY 2009-2010 operating budget and athletic budget forms, FY 2008-2009 Operational Fee Attestation and FY 2009-2010 Mandatory Tuition and Fees Survey. All forms and instructions needed to complete these requests can be found on the Board of Regents website www.regents.state.la.us under the Finance/Facilities section under the heading "forms"/"Operating budget data", and I direct your attention to them and urge your review before proceeding to complete. The operating budget forms (BOR-1 through BOR15) and athletic budget forms (BORATH-1 through BORATH-3) have been revised from the previous year only to reflect changes in the FY headings.

Formula Institutions should send one completed bound set of these operating budget forms for each of your institutions to this office no later than **September 1, 2009**. The column for FY 09-10 budgeted, and FY 08-09 budgeted should be completed and the column labeled FY 08-09 actual should be left blank. In addition to the one completed bound set, forms BOR-1, BOR-2, and BOR-3 should also be e-mailed to lori.parker@la.gov. Once these FY 2009-2010 operating budgets are approved by the Board of Regents, the formula institution budgets along with an overall formula funding request will be submitted to the Division of Administration as the FY 2010-2011 budget request for formula institutions.

The non-formula units, LUMCON, LSU Pennington Biomedical Research Center, Southern Agricultural Center and each of the four management boards should submit one bound copy of forms BOR-1, BOR-2, and BOR-3 to this office no later than **September 1, 2009**. The column for FY 09-10 budgeted, and FY 08-09 budgeted should be completed and the column labeled FY 08-09 actual should be left blank. In addition to the one completed bound set, forms BOR-1, BOR-2, and BOR-3 should also be e-mailed to lori.parker@la.gov.

Act 49 of the first extraordinary session of 1998 requires that the operating budgets shall contain, at a minimum, budgetary information on prior year actual revenues and expenditures. In order to comply with Act 49 it is requested that **formula institutions** submit to this office no later than **October 1, 2009**, ten completed bound copies of the BOR-1 through BOR-15 forms and the BOR-ATH-1 through BOR-ATH-3 forms with the FY 09-10 budgeted, FY 08-09 budgeted, and the FY 08-09 actual columns completed. At this time, we are requesting that the **non-formula units** provide us with one completed bound copy of the BOR-1, BOR-2, and BOR-3 as completed as above.

The **non-formula units** will continue to request funds using the Division of Administration's budget forms. Ten copies of these budget requests are due in this office no later than **October 15, 2009**.

In addition, Louisiana Revised Statute 17:3351 A.(5)(d)(i) grants each management board authority to provide for the assessment of an operational fee at each institution under its management and supervision in an amount not to exceed four percent of the total mandatory tuition and fee amount in effect for each institution on August 15, 2004. Further, Louisiana Revised Statute 17:3351.A.(5)(d)(v) states that at any postsecondary institution, any excess of revenue resulting from the imposition of an operation fee as authorized (above) over mandated costs applicable to the institution in any fiscal year shall be used by the institution solely for the enhancement of any instructional programs and may not be used to pay the salary of any university or university system administrator as is provided for the use of the academic excellence fee. In an effort to ensure compliance with the law, please have each institution under your authority submit to the Board of Regents the attached documentation entitled FY 08-09 request for operational fee that would attest to the fact that if the institution had any excess revenues resulting from the imposition of an operational fee over mandated costs applicable to the institution in FY 2008-2009, those excess revenues were used by the institution solely for the enhancement of any instructional programs and were not used to pay the salary of any university or university system administrator. The documentation should be sent by **Friday, September 4, 2009** to the attention of Mr. Chris Dalton, Postsecondary Education Audit Director. If you should have any questions, please do not hesitate to contact Mr. Dalton at 225-342-4253.

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FY 2009-2010 Operating Budget Request

Please fill out the form 2009-2010 Annual Mandatory Tuition and Fees. Email the completed forms to Mrs. Lori Parker, Assistant Commissioner for Budget Analysis at lori.parker@la.gov by **Friday, September 4, 2009**. Please include on the schedules any notes which may clarify unique circumstances regarding tuition and fees applicable to any of your institutions. For the purpose of completing these forms, you should include your estimated energy surcharge amount.

If you have questions concerning these matters, contact me or Lori Parker, Assistant Commissioner for Budget Analysis at 225-342-4253.